

Share and Interact Securely Inside the Organization

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Searching


Quick Search

Quick Search (see *figure 1.0.3*) allows you to search for a file based on its name and, if your system is configured to do so, its content. Search allows you to search for a file based on the file's properties as well as content and name.

1. Type in a partial or full name into the search box.
2. Click the **Search** button, or press **enter**.



Search

1. Click the  **Expand** button to the right of the search button.
- 2.


The File or Folder Name	Using the drop-down menu, select either Name "Contains" or "Equals". Enter the word in the Name field that you wish to find.
File Content Contains	Enter in the word(s) in the Content field that you wish to find.
Conditions	"Where all these conditions are met" or "Where any of these conditions are met"
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".

3. Click **Search**

The search results display a list of the files matching your criteria. From here, you may open the file or perform other options (e.g. Save Search) with the available buttons.





Save a search

1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search**  button.
5. Within the **Save Search** window, supply a name for the search.
6. Click **OK**.



Save search results

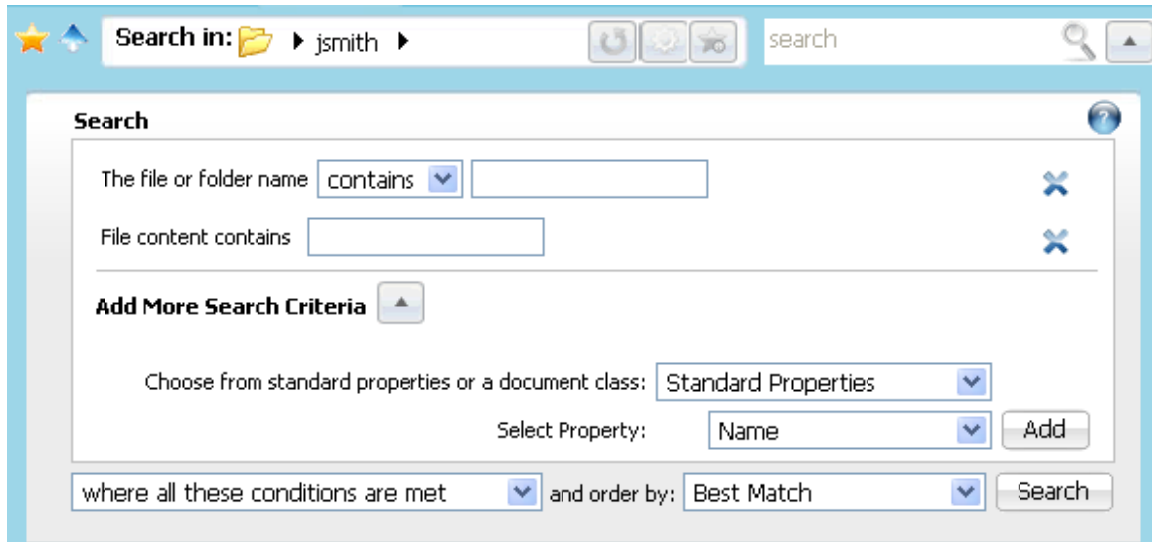
1. Navigate to the Search or Advanced Search screen.
2. Select criteria for the search.
3. Click the **Search** button.
4. Click the **Save Search Results**  button.
5. Within the **Save Search Results** window, provide a name for the file and determine the location in which to save it.
6. Use the  **Expand** button in order to view your folders. Click on the folder in which you would like the file saved.

7. Click **OK**.





Advanced Search

Advanced Search allows you to search for a file based on standard file properties, file classification properties or a combination of those properties.



(Figure 4.0.0)

1. Click the  **Expand** button to the right of the **search**  button in order to specify the search criteria.
- 2.


File or Folder Name	Using the drop-down menu, select either Name "Contains" or "Equals". Enter the word in the Name field that you wish to find.
File Content Contains	Enter in the word(s) in the Content field that you wish to find.
Standard Properties	Using the drop down menu, select from the available standard properties such as Tags, Owner, Name, etc.
Document Class Properties	Using the drop down menu, select from the available document classes and their properties as specific to your environment.
Order By	Using the drop-down menu, select either Order By "Best Match" or "Most recently Modified".

3. Click the **Add Criteria** button.
4. You may select from standard file properties and predefined Document Class properties.
5. Select the appropriate file property and or document class in which to search and the associated criteria.
6. Click the **Add Criteria** button in order to add additional search criteria.
7. Using the drop-down menu, specify either **"Where all these conditions are met"** or **"Where any of these conditions are met"**.
8. Using the drop-down menu, specify either **Order by** "Best Match" or "Most Recently Modified".
9. Click the **Search** button.




Saved Search

Within Xythos you may create, modify and visit your searches at any time. Not only the search results may be saved, but also the search itself. If you know that each month you must perform a search based on content or classification properties, you need only use the existing saved search.

1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Any currently saved searches will be listed by name.
3. Click on the **saved search** of your choice in order to initiate the search.
4. The search screen will open with the results of your saved search criteria.
5. *Optionally, you may now use the **Save Search** or **Save Search Results** buttons.*

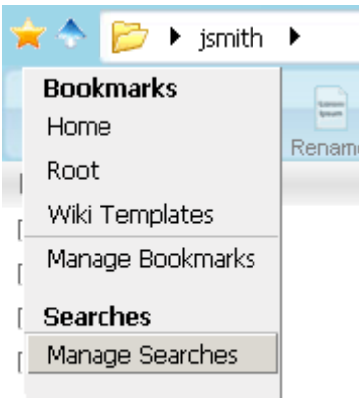


Last Search




1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Click on the **Last Search** link.
3. The search screen will open and your last search along with any results will be listed.
4. *Optionally you may now use the **Save Search** or **Save Search Results** buttons.*



Manage Searches



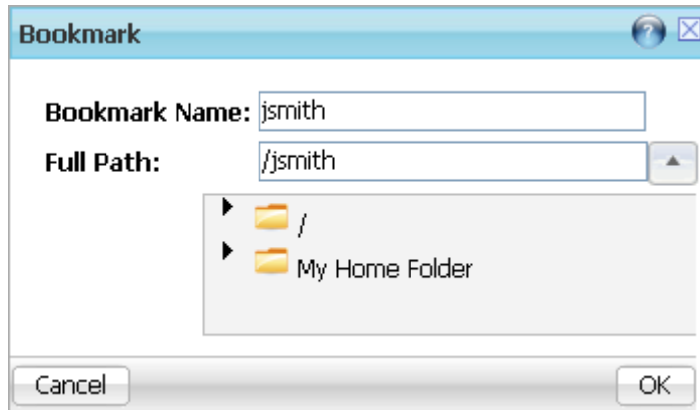
(*Figure 4.0.1*)

1. Within the **Document Manager**, click the **bookmarks and searches**  icon to the left of the navigation bar (See *Figure 1.0.2*). This will open the **Searches and Bookmarks** menu.
2. Click on the **Manage Searches** link.
3. The Manage Searches screen will open and all currently saved searches will be listed by name.
4. Rename or Delete the saved search by placing a checkmark in the box associated to the saved search, and then clicking either the **delete**  or **rename**  button.
5. Click the **Finish** button to exit the screen.

Bookmarks

Bookmarks are shortcuts to folders and files within your Xythos account. Using Bookmarks, you can conveniently create shortcuts to your most frequently accessed folders and files. You can also create shortcuts to other users' folders and files you have been allowed to access.


You may navigate to your bookmarks at any time by clicking on the **Bookmarks** button. In order to bookmark a file or folder, you must have **read** access to that file or folder. Once you bookmark a file or folder, it will be available each time you login to your account and click on the **Bookmarks** button.




(Figure 4.0.2)



Creating Bookmarks

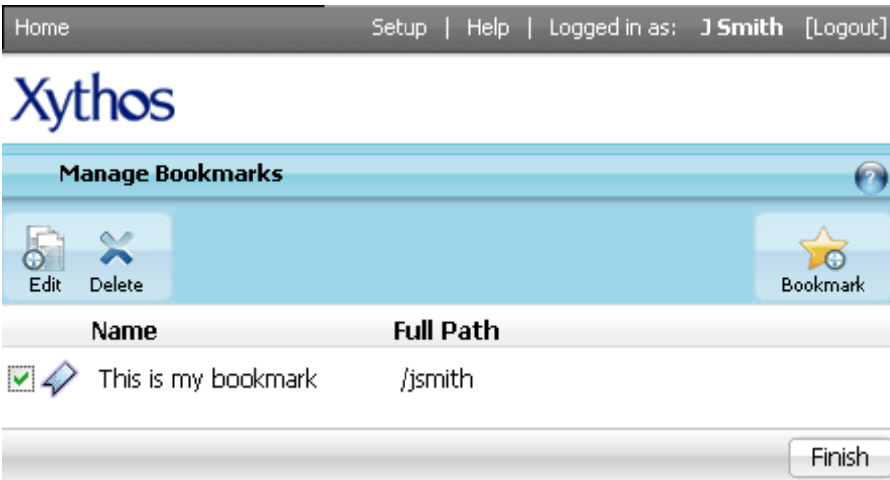
1. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Create a Bookmark**  button.
- OR -
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Bookmark** option.
2. Provide a name for the Bookmark.
3. Provide the Full Path of the file or folder.

**Note: This will be provided for you if you have selected the file or folder first.*

Optionally use the **Expand**  button to browse to the Full Path of the file or folder.

4. Click **OK**.

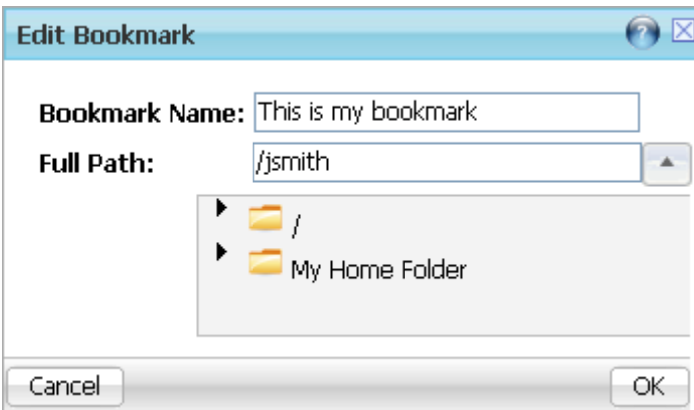
Using Bookmarks





(Figure 4.0.3)





Edit a bookmark



(Figure 4.0.4)

1. On the **Document Manager** screen, click the **Bookmarks and Searches**  icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to modify, and then click the  **Edit** button.
3. Modify the **Bookmark Name** and/or the **Full Path**
4. Click **OK**.

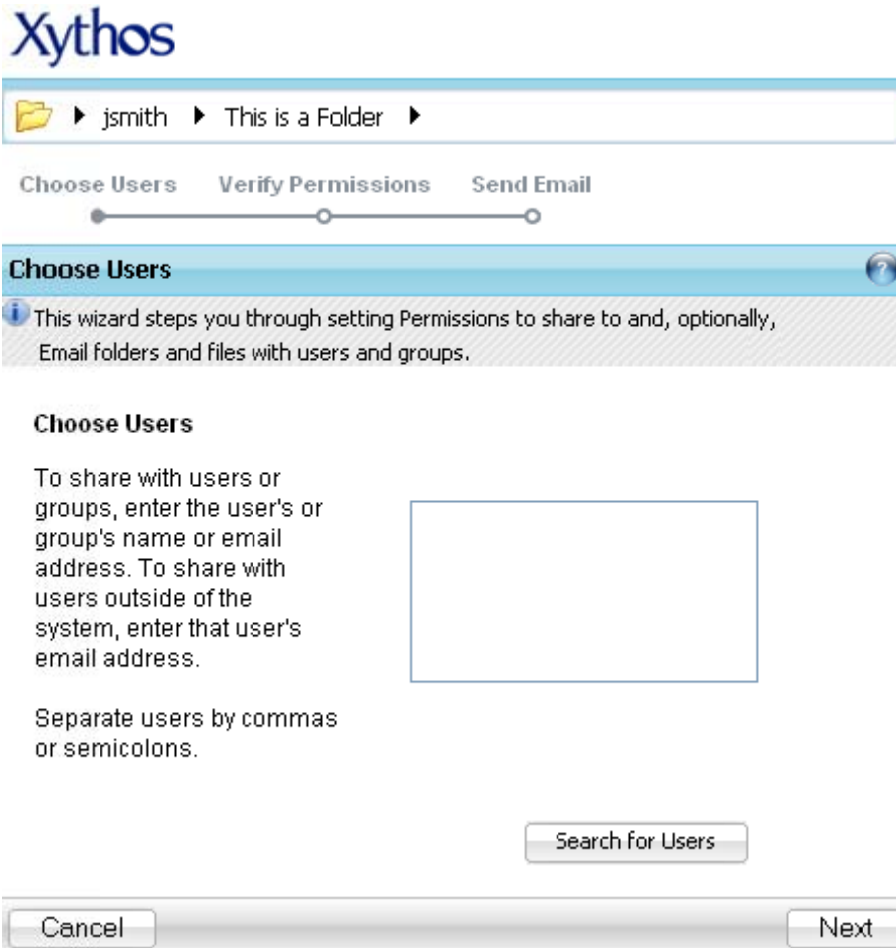
Delete a bookmark

1. On the **Document Manager** screen, click the **Bookmarks and Searches**  icon, and then click the **Manage Bookmarks** link.
2. Place a checkmark in the box associated to the Bookmark you would like to delete, and then click the  **Delete** button.
3. The Bookmark will be immediately deleted.





Share Wizard

The **Sharing Wizard** guides you through sharing and notifying users. You may follow each step of this wizard, skip through to the desired step or end the wizard at any time.



(Figure 4.0.5)


1. Within the **Document Manager** put a checkmark in the box associated to the file or folder you would like to share.
2. Click the **Share**  button or Right-click on the file or folder and select the **Share** option.
3. You are now in the **Sharing Wizard**.
4. You will be brought to the **Choose Users** screen.
5. Either begin typing in the user information in the box provided, or use the find utility.
6. Click the **Next** button.

 ▶ jsmith ▶ This is a Folder ▶

Choose Users Verify Permissions Send Email

————— —————

Verify Permissions

 Defined the type of access other users will have.

Name	Type	Viewer (Read-Only)	Contributor (Read, Write, (Delete)	Full Access (Read, Write, (Delete, Administer)	Other...
Mary Snow (msnow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Henry Jenkins (hjenkins)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
admin group	Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Tony Crow (tcrow)	User	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Apply the changed permissions to this folder as well as its sub-folders and files.
 Apply the changed permissions to this folder only.

(Figure 4.0.6)

7. Select your preferred sharing options.
8. You may select the following options: Viewer, Contributor, or Full Access.
9. If you are currently setting sharing permissions on a folder, rather than a file you will need to determine whether this access should apply to the current folder only, or this folder and all sub-folders by clicking on the appropriate radio button.
10. *Optional: Click **Finish** to skip the Email portion and exit the Wizard.*
11. Click **Next**.

jsmith ▶ This is a Folder ▶

Choose Users Verify Permissions Send Email

Send Email

You may edit the text surrounding the table of files only. File links will be added once the email is sent.

Send the below email when I click Finish

Mary Snow (msnow@xythos.com) ✕ Henry Jenkins (hjenkins@xythos.com) ✕

To: (all the members of) admin group ✕ Tony Crow (tcrow@xythos.com) ✕

Subject: J Smith has shared some resources to you

A **B** *I* U ↶ ↷ Ω % 🖼️ 🌐 📄 📄 📄 📄 📄 📄 📄 📄

The following has been shared to you.

File	Subscribe to and/or Bookmarks
Your list of files will be added to this table once you send this email.	

Thank you,
J Smith

Also send the email to me (J Smith)

Cancel Back Finish

(Figure 4.0.7)

12. You will be brought to the **Email** screen.
13. Create an email to notify users of the new share.
14. *Optional:* Click **Back** to return to the previous step.
15. Click the **Finish** button to exit the Sharing Wizard.

Permissions

By default, every item is created with 3 sets of permissions:

- **Owner** - You are the owner of the items within your own account.
- **Users with Accounts** - Any users, in your Organization or outside of your Organization, that have a Xythos account. Users must be logged in to their Xythos account in order to gain access to the files or folders.
- **Public** - Any user accessing the service without an account or those users with accounts who have not logged in. Use this option to make your files and folders public to the outside world.

Within the Document Manager, there is a column labeled **Shared To**. This column identifies the following:

- **"None"** This file or folder is not shared to any other user.
- **"Some"** This file or folder is shared with another user, but not all users.
- **"Everyone"** This file or folder is shared with either the **Public** or shared with all users with an account.

Xythos enables you to control access to your files in four different ways, represented by the four columns of permissions: Read, Write, Delete, and Administer.

Read Permission

Read permission allows the user or **Group** of users to view the file or folder only. If a user is granted **Read** access on a folder, they are not automatically granted **Read** access to all of the folder's contents. The user will only have access to view the folders, sub-folders and files to which you have implicitly granted them access.

Write Permission

Write permission allows the user or **Group** of users to write to the file or folder only. Write access includes the following: viewing, editing, renaming both the contents and options of the file or folder. If a user is granted **Write** access on a folder, they are not automatically granted **Write** access to all of the folder's contents. The user will only have access to write to the folders, sub-folders and files to which you have explicitly granted them access.

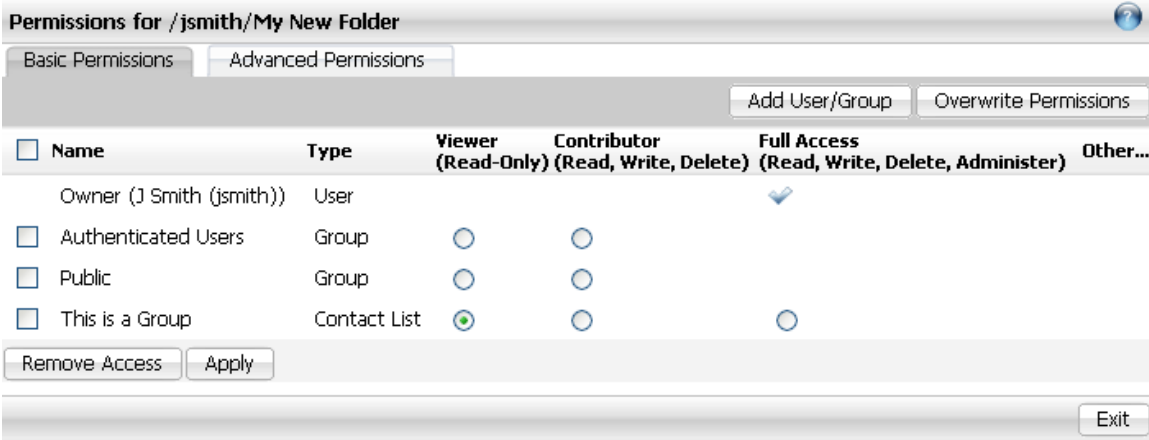
Delete Permission

Delete permission allows the user or **Group** of users to move the file or folder to the trash. If a user is granted **Delete** access on a folder, they are not automatically granted **Delete** access to all of the folder's contents. The user will only have access to delete the folders, sub-folders and files to which you have explicitly granted them access.

Administer Permission

Administer permission allows the user or **Group** of users full access to a file or folder's **Manage/Summary** screen and the permission to make modifications to all "Manage" items. If a user is granted **Administer** access on a folder, they are not automatically granted **Administer** access to all of the folder's contents. The user will only have access to administer the folders, sub-folders and files to which you have explicitly granted them access.

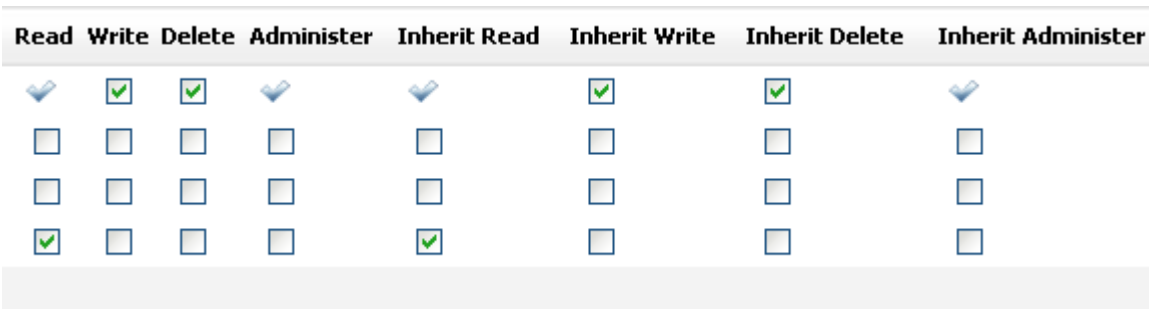
Basic Permissions



(Figure 4.0.8)

1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Viewer, Contributor** or **Full Access** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

Advanced Permissions

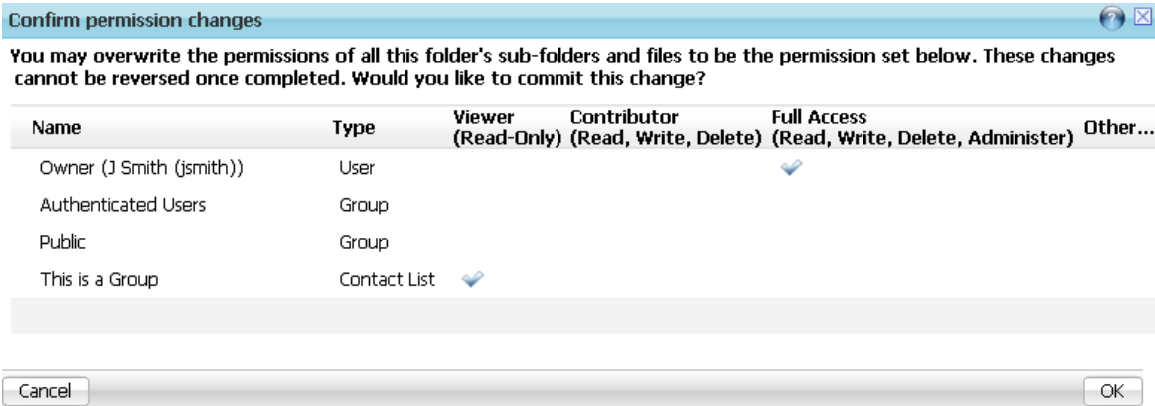


(Figure 4.0.9)


1. On the **Document Manager** screen, **Right-click** the selected file or folder, and then click the **Manage -> Permissions** option.
2. Click on the **Advanced Permissions** tab.
3. Click the **radio** button associated to the user or group to which you would like to provide **Read, Write, Delete, Administer, Inherit Read, Inherit Write, Inherit Delete** or **Inherit Administer** permissions.
4. Selecting the checkbox associated to a user or group, and then clicking the **Remove Access** button will remove the user or group from the permissions to this file or folder.
5. Clicking on the **Add User/Group** button will bring you to the Sharing wizard.
6. Once all permissions are complete, click the **Apply** or **Exit** button.

Overwrite Existing Permissions

When modifying folder Permissions, by default, you are adding permissions to the existing permission set. In order to overwrite the existing permission set, you must click the **Overwrite Permissions** button. When the **Overwrite Permissions** button is used, then all previous settings will be erased for the current folder, all of the folder's sub-folders and files. These changes **cannot be reversed** once completed. This change applies to **all files and sub-folders located within the current folder, the current permissions of the files and sub-folders will be changed to match the current folder.**

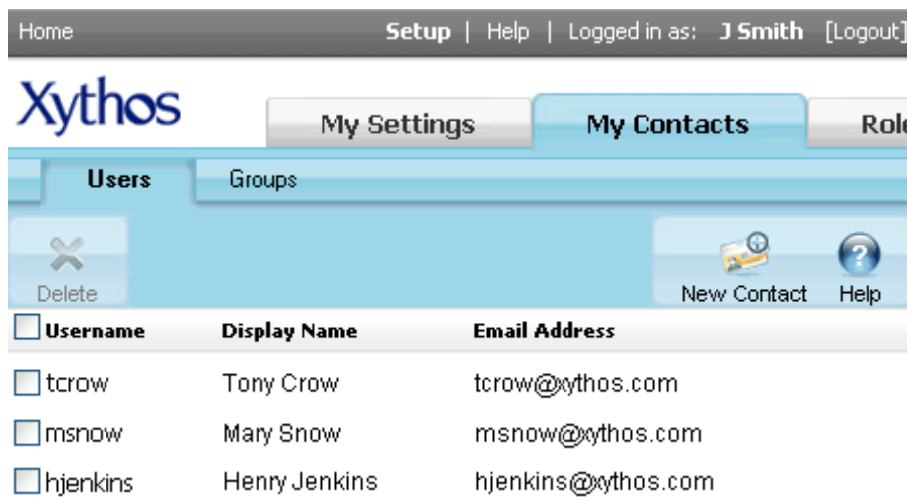


(Figure 4.1.0)

1. On the **Document Manager** screen, **Right-click** the selected folder, and then click the **Manage -> Permissions** option.
2. Click on the **Basic Permissions** tab or the **Advanced Permissions** tab.
3. Set the folder and inherit permissions.
4. Click the **Overwrite Permissions**  button.
5. Click the **Apply** button to confirm changes, or click **Cancel** to discard changes.

My Contacts

You may add contacts and groups to your account for ease in sharing and emailing other users. The groups which you create viewable only by you; however the administrator may have already created organization groups for use by everyone at your organization.



(Figure 4.1.1)

Contacts

You can share your files with other users who have Xythos accounts. You may share files and folders with users within your organization directly from the file or folder's Sharing page.



Add a new Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Click the **New Contact** button.
4. Using the Find utility, you may locate a user by Name or Email from within your Organization.
5. Enter in the search criteria, and then click **Find**. If you would like all users in your organization listed, leave the "Find User" field blank.
6. All users matching your search criteria will be listed. Highlight the user you would like to add as a contact, and then click **OK**.

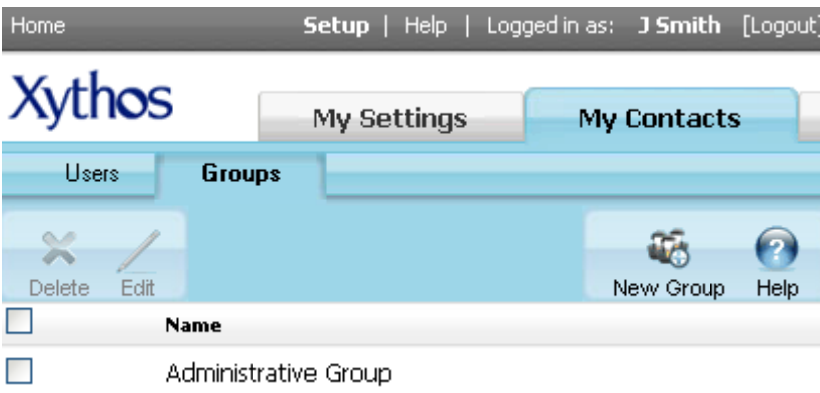


Delete a Contact

1. Click on the **Setup** link in the **Main Menu**, and then click on the **My Contacts** tab.
2. Click on the **Users** tab. This will open your *existing* contacts.
3. Place a checkmark in the box which corresponds to the Contact(s) you wish to delete.
4. Click the **Delete** button. The Contact is immediately and permanently deleted.

Groups

You may sometimes wish to make your files available to a customized *Group* of users rather than to individual users or to the entire "Public". Groups are a convenient way for you to organize groups of users that need to access the same files. By granting the Group permission to access a file or folder, you allow every user in that group to access it.



(Figure4.1.2)



Add a new Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click the **Groups** tab.
4. Click the **New Group**  button.
5. Provide a **Name** for the Group, and then click **Next**.

6. Use the **Find** feature to locate users.
7. Select the users you wish to add, and click the **Add Selected Users** button. Repeat this process for each of the users you wish to add.
8. Click the **Save** button when you have completed configuring your **Group**.



Add or remove users for an existing Group

1. Within the **Main Menu**, click the **Setup** link.
2. Click the **My Contacts** tab.
3. Click on the **Groups** tab.
4. Place a checkmark in the box associated to the group you wish to modify, and then click the **Edit** button.
5. Place a checkmark in the box associated to the user(s) you wish to remove from the group, and then Click the **Delete** button. Click the **Add Member** button if you wish to add additional users to the group.
6. Click the **Exit** button when you have completed configuring your **Group**.